Microsoft D365: Agent Assist

Quick Reference Guide: Crisis Screening, Nonresponse, FIT Dispatch

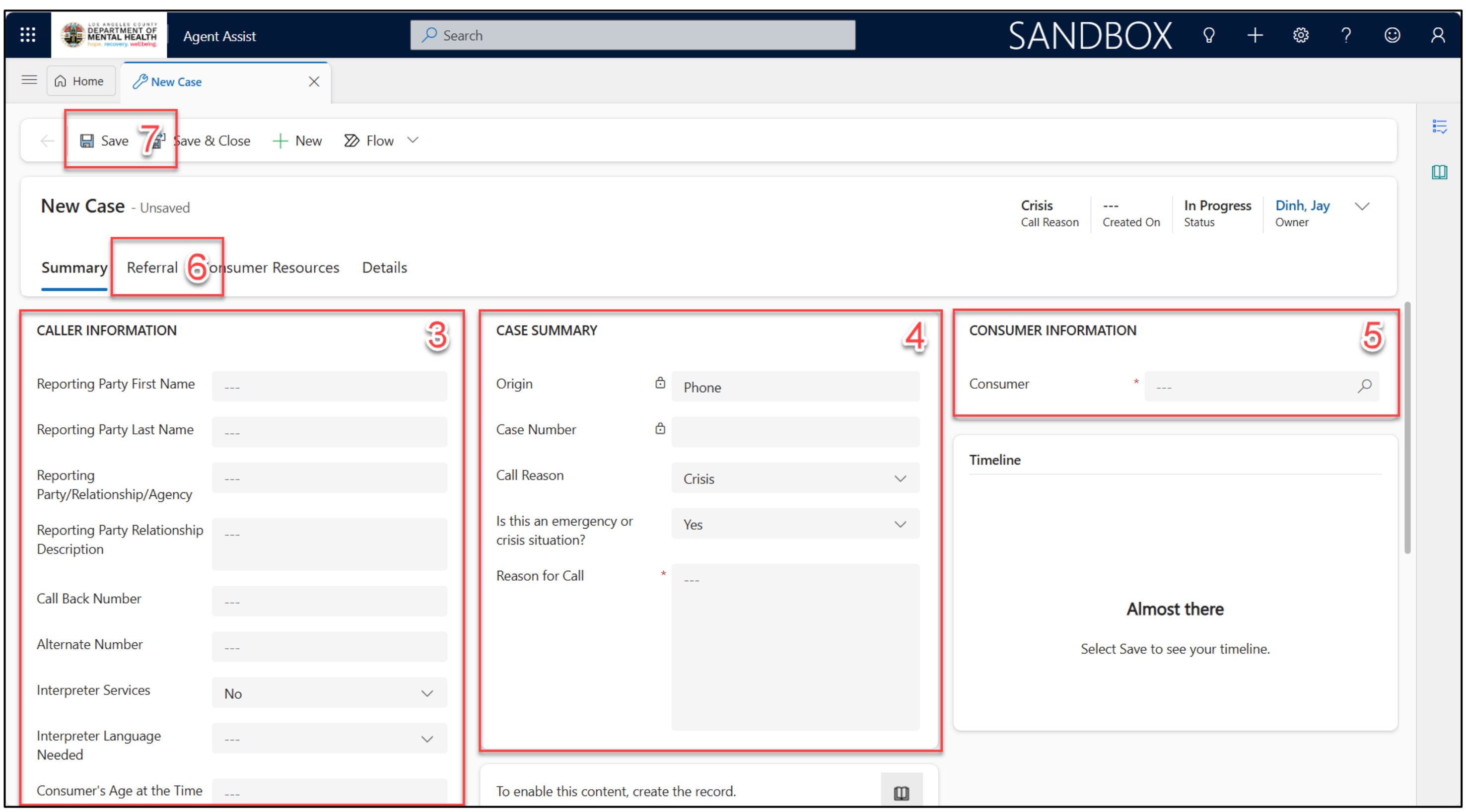
Crisis Screening, Nonresponse & FIT Dispatch Request

Creating a New Case

1. Navigate to your Home Page.
2. Next, create a new case. In the command bar, click **+ New Case**.
3. On the new case record, fill in the fields under **Caller Information.**
4. Fill in the fields under **Case Summary**:
   - <u>Call Reason:</u> **Crisis**
   - <u>Is this an emergency or crisis situation?</u>: **Yes**
   - <u>Reason for Call</u>
5. Fill in the field under **Consumer Information**:
   - <u>Consumer</u>
6. Then, navigate to the **Referral tab**. Enter the following fields in the **Contact Information for this Request** and **Requester/Referring Party** sections.
7. Then, **Save** the record.

Tip: You will notice that for a call reason of crisis screener, the command bar does have a few more options. You have the Crisis Screen, FIT Dispatch Request, and Nonresponse form.

Depending on the resolution that you have in your browser, some of these buttons can start to get collapsed. Select the Ellipses to expand a dropdown menu to view all the available buttons.



For additional resources, visit the Adaptive Learning Platform.

Completing the Crisis Screener

8. Next, complete a crisis screener. In the command bar, click **Crisis Screen.**
9. A Crisis Screen window appears where the Crisis Screening Type will auto-populate. Click **Confirm**.
10. In the New Crisis Screening window, fill out the screener. Once the questions are answered, save the crisis screening by clicking **Save** in the command bar.
11. An **Outcome** and **Priority** will auto-populate based on the answers provided. The following outcomes could occur:
    - "**Refer to 911**", refer the caller to 911. Then, update the case with the call details, document the Final Disposition, and resolve the case.
    - "**Refer to 988**", refer the caller to call 988. Then, update the case with the call details, document the Final Disposition, and resolve the case.
    - "**Dispatch FIT**", save and close the record and generate a FIT Dispatch request. Then, update the case with the call details, document the Final Disposition, and resolve the case.
    - "**Referral/Urgent Appointment**," update the Call Reason to "Clinic Referral" and skip the DHCS Medi-Cal screener. Once a referral is confirmed, an SRTS Service Request is created.

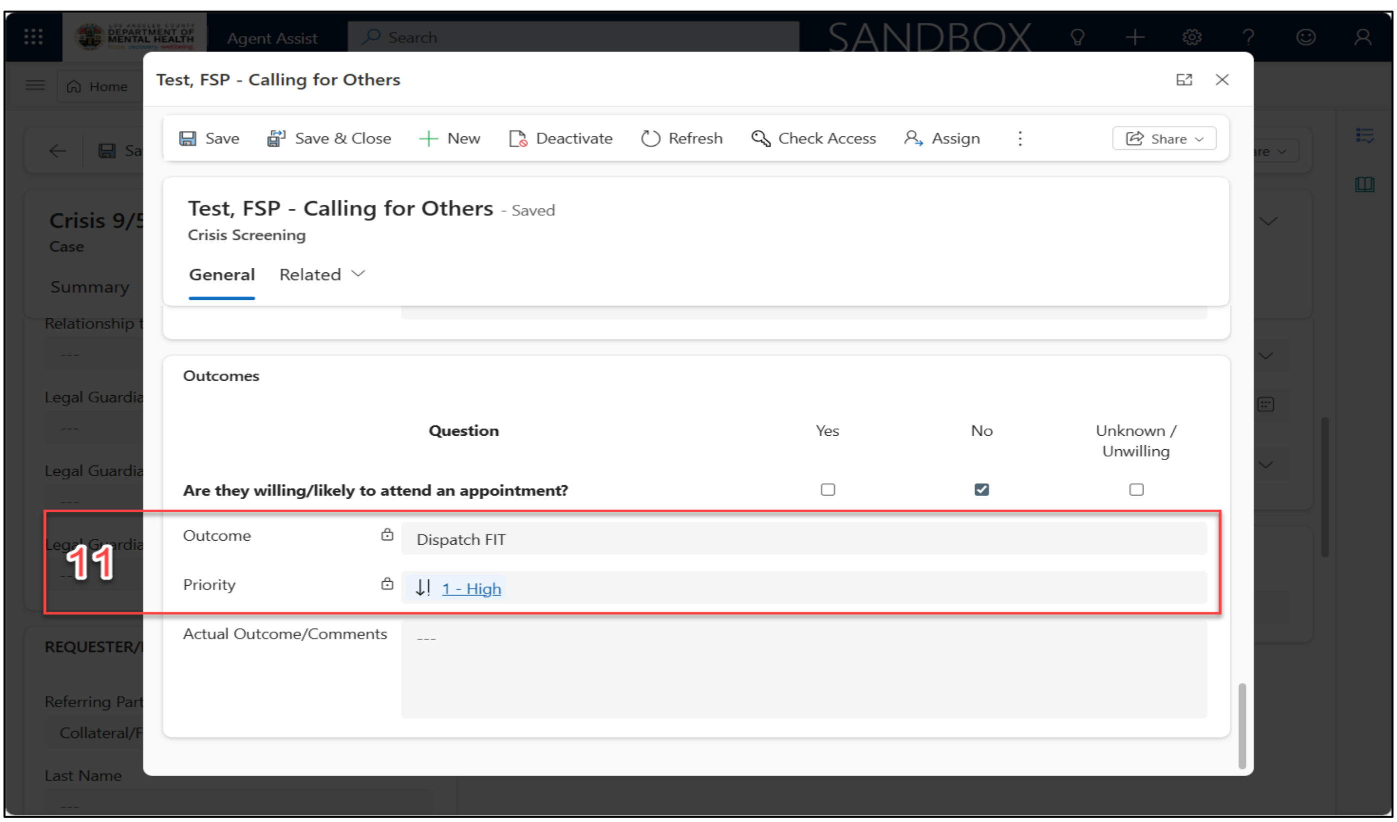
Note: Depending on the responses checked, there may be popup windows with further instructions on how to handle the situation.

For example, if you answer "Yes" to "Is this person in immediate life-threading danger to themselves or others?", a message appears stating to contact 911.

If you select OK, the crisis screener will be marked as "read-only" and you will not be able to modify it. If this was selected on accident, click Cancel.

Tip: In the Outcomes Section, at any time if the crisis screener is giving you an outcome in which you don't agree with, you would document and type necessary comments and information about the actual outcome in the "Actual Outcome/Comments" section of this form

For example, if it states "Referral/Urgent Appointment" but you don't agree and you think the Field Team needs to be dispatched, you will document that here and then create a FIT Dispatch Request.



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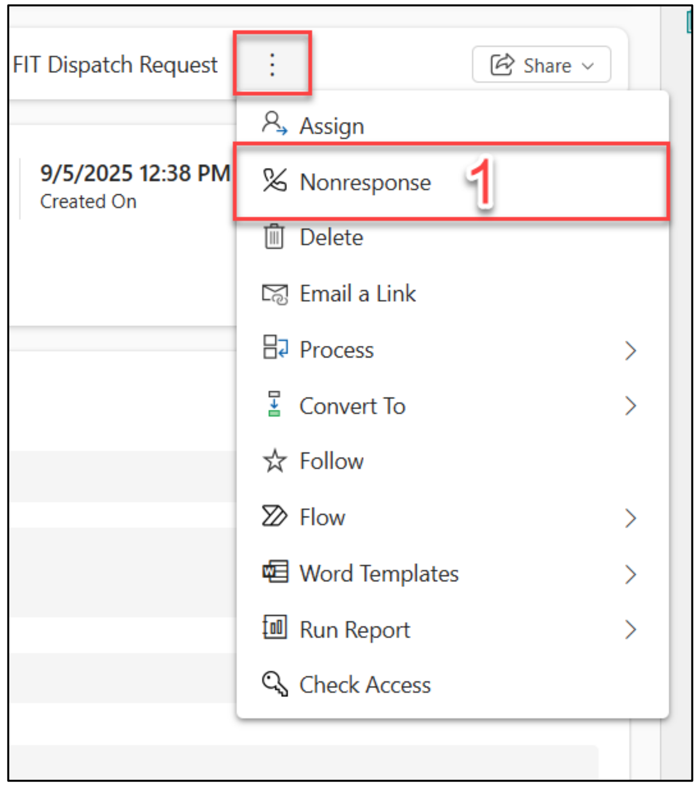
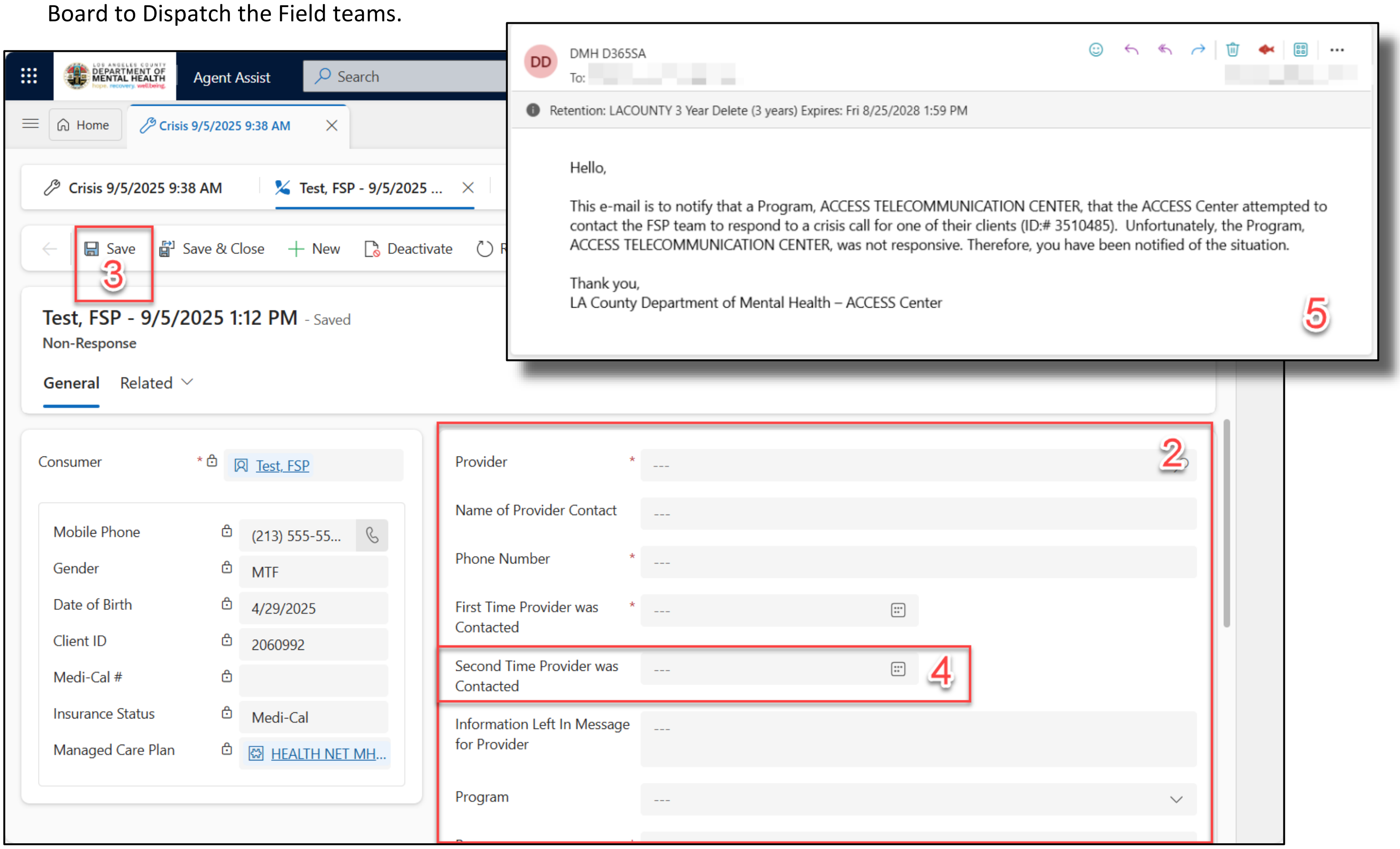
Completing a Non-Response Form

1. Check if the client is enrolled into FSP or Wraparound by navigating to the Consumer record, in the **Program Status** Tab. If Consumer is enrolled, contact the Program. If there is no response, document a Nonresponse. To document a Nonresponse on a case record, from the command bar, click **Nonresponse**.
2. Then, enter the following fields:
   - Provider
   - Phone Number
   - First Time Provider was Contacted
   - Information Left In Message for Provider
   - Program
   - Response
   - If no response, please explain
   - Supervisor Notified
   - Name of supervisor notified (ACCESS Supervisor)
3. Then, click **Save**.
4. If there is still no response after another attempt to contact the provider, fill in the following fields:
   - Second Time Provider was Contacted
   - Response
   - Supervisor Notified
   - Name of Supervisor Notified
5. Upon clicking **Save** or **Save & Close**, an email notification will be sent to internal DMH staff to indicate the nonresponse occurred. Sample email below.
6. The case will now need to be placed on the Dispatch Board to Dispatch the Field teams.





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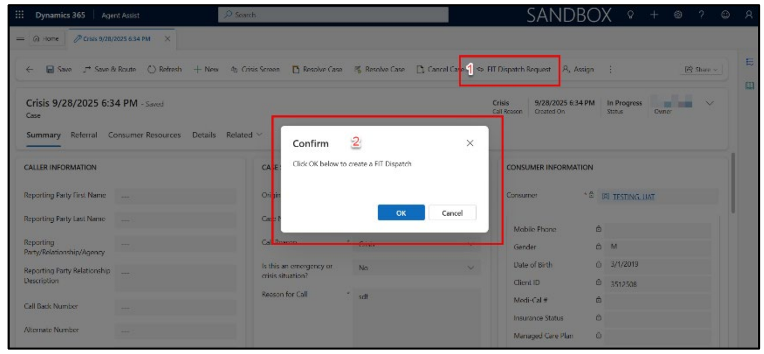
Creating a FIT Dispatch Request

1. To create a FIT Dispatch Request, from the command bar, click **FIT Dispatch Request**.
2. A pop-up window will appear stating ‘Click OK below to create a FIT Dispatch’. Click **OK**.
3. A pop-up window will appear stating ‘The work order was created successfully. Open the newly created work order? Note: Some detail records might take a few minutes to be generated.’
   Click **OK** to be navigated to the FIT Dispatch Record. <u>You will now need to work quickly to complete this form as the record has already been generated and put onto the FIT Dispatch Board and the Dispatcher may be ready to send out a team.</u>
4. On the FIT Dispatch Request, complete the required fields such as Responsible Team and any other required fields. You may complete any additional fields at your own discretion.
   Note: The **Dispatch To Address** is mapped over from the Consumer record. You may change the **Dispatch To Address** at this time if you need to if the consumer is not at the location mapped over from their Consumer Record.
5. Once the required information has been entered, click **Save & Close** to return back to the Case record.
6. Now, **Resolve Case**.



Tip: If you click on the notification banner on the top, “You have 8 notifications. Select to View”, and select any of the items, it will take you to that exact field on the form.

How to Navigate to the FIT Dispatch Board

1. You may receive follow up calls from from PMRT to request for an ambulance. You would document this in the Timeline of the FIT Dispatch Record. Navigate to the Site Map and select **FIT Dispatch**.
2. Change views to ‘**ACCESS All Dispatch Calls**’ View and locate the Dispatch Record.
3. Scroll down to the bottom of the FIT Dispatch Record to document in the **Timeline.**

Note: You may also receive subsequent calls from the FSP provider after the call has been placed on the board. You will also document this in the Timeline of the FIT Dispatch Record.